ASP NONPROFIT CENTER FOR EXCELLENCE

FIRST MONDAYS DISCUSSION

TOPIC: Launching and Guiding Strategic Transformation: A Case Study

DATE: MONDAY, MARCH 5, 2018
Discussion Background:

The field of philanthropy has been challenged in recent years to become more transparent and accountable to its stakeholders, and to demonstrate more effectively the ultimate impact of the investments being made to address society’s most pressing problems. There has been much discussion of the need for a more evidence-based, outcomes-oriented approach to achieving impact, but overall a lack of visible progress in getting there.

In this session, Blair Dimock will provide a first-hand account of the story of transformational change at one of Canada’s largest grantmaking foundations, the Ontario Trillium Foundation (OTF). With annual investments of over $135 million in community-based initiatives across Ontario, OTF plays a leading role in supporting the development and evolution of the nonprofit sector in Canada’s largest province (population 11 million).

Beginning with a strategy review launched in 2013-14, OTF has reinvented itself from being a reactive to a proactive funder, introducing an outcomes-based model grounded in a data-driven approach to every aspect of its work. OTF’s decision to transform what it funds and how it funds was a direct response to the disruptions in the environment facing the nonprofit sector in Ontario, from the slow growth economy and government austerity to demographic change and the increasingly complex nature of the social and environmental challenges facing communities today.

Join Blair for a mini case study of the OTF experience across four key dimensions of the transformation process:

- Strategic Clarity – the “what we do” of an evidence-based approach
- Simple and Fair Processes – the “how we do it” of an evidence-based approach
- Open, Transparent Accountability – the “so what” of an evidence-based approach
- Commitment to a Learning Culture – the “who we are” of an evidence-based approach

Join Blair and other participants in a dialogue about the challenges and opportunities of adopting an evidence-based approach for your organization. The session will include practical tips and tools on how to approach a strategic transformation, and a glimpse at the early results of OTF’s new investment model.